



1

---

---

---

---

---

---

---



2

---

---

---

---

---

---

---



3

---

---

---

---

---

---

---

## Why “Beyond the Sunday Offering”?



**ARE YOU LEAVING MONEY ON THE TABLE?**

A question we don't often ask in the church...

EQUIPPING WORLD-CHANGING DISCIPLES [UMCDiscipleship.org](http://UMCDiscipleship.org)

**DISCIPLESHIP MINISTRIES**  
The United Methodist Church

4

---

---

---

---

---

---

---

---

## People Give From 3 Pockets

**1. Income**

Traditionally  
referred to as  
“Planned Giving.”

**2. Assets**  
**3. Legacy**



EQUIPPING WORLD-CHANGING DISCIPLES [UMCDiscipleship.org](http://UMCDiscipleship.org)

**DISCIPLESHIP MINISTRIES**  
The United Methodist Church

5

---

---

---

---

---

---

---

---

## “Year-long Stewardship Strategy”

**If your year-round strategy only includes asking for donations from the income pocket, it's not a complete strategy.**



EQUIPPING WORLD-CHANGING DISCIPLES [UMCDiscipleship.org](http://UMCDiscipleship.org)

**DISCIPLESHIP MINISTRIES**  
The United Methodist Church

6

---

---

---

---

---

---

---

---



7

---

---

---

---

---

---

---

---

### Is Estimate of Giving Planned?

2020 ESTIMATE OF GIVING

☐ Yes, I will pray for the mission and ministry of St. Paul's United Methodist Church.  
 I estimate I will grow in my giving as follows:  
 My estimate is \$\_\_\_\_\_ per ☐ week ☐ month ☐ year for an annual total of \$\_\_\_\_\_

Name: (please print) \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Phone(s): \_\_\_\_\_ Email: \_\_\_\_\_

I understand that I can revise or cancel this estimate of giving at any time.

EQUIPPING WORLD-CHANGING DISCIPLES UMCdiscipleship.org

8

---

---

---

---

---

---

---

---

### Is Online Recurring Gift Planned?

Don't usually  
consider these as  
"Planned Giving"  
because they are  
primarily from that  
income pocket.

EQUIPPING WORLD-CHANGING DISCIPLES UMCdiscipleship.org

9

---

---

---

---

---

---

---

---

### Asset Pocket: Cash

Asset gifts are very often cash gifts, from savings or other accounts not used for regular expenses.



EQUIPPING WORLD-CHANGING DISCIPLES [UMCDiscipleship.org](http://UMCDiscipleship.org)

DISCIPLESHIP MINISTRIES  
The United Methodist Church

10

---

---

---

---

---

---

---

---

### Asset Pocket: Stocks, Bonds



Could be stocks, bonds or other transferable investments, often appreciated in value.

EQUIPPING WORLD-CHANGING DISCIPLES [UMCDiscipleship.org](http://UMCDiscipleship.org)

DISCIPLESHIP MINISTRIES  
The United Methodist Church

11

---

---

---

---

---

---

---

---

### Asset Pocket: Cryptocurrency

Bitcoin and other cryptocurrency?



Read Article: "10 Things Churches Need To Know About Cryptocurrency."

EQUIPPING WORLD-CHANGING DISCIPLES [UMCDiscipleship.org](http://UMCDiscipleship.org)

DISCIPLESHIP MINISTRIES  
The United Methodist Church

12

---

---

---

---

---

---

---

---

## Asset Pocket: Real Estate



Home, vacation,  
business or  
investment  
property.



EQUIPPING WORLD-CHANGING DISCIPLES [UMCDiscipleship.org](http://UMCDiscipleship.org)

DISCIPLES MINISTRIES  
The United Methodist Church

---

---

---

---

---

---

---

---

13

## Asset Pocket: Tax Savings



Increased valuation  
means increased  
tax liability, and  
possibly an  
attractive donation.

EQUIPPING WORLD-CHANGING DISCIPLES [UMCDiscipleship.org](http://UMCDiscipleship.org)

DISCIPLES MINISTRIES  
The United Methodist Church

---

---

---

---

---

---

---

---

14

## Asset Pocket: IRA or 401k

Retirement plans  
(IRA, 401K) have  
required minimum  
distributions (RMDs)  
that may be taxable.



EQUIPPING WORLD-CHANGING DISCIPLES [UMCDiscipleship.org](http://UMCDiscipleship.org)

DISCIPLES MINISTRIES  
The United Methodist Church

---

---

---

---

---

---

---

---

15

### Asset Pocket: Antiques, Collectibles



How readily can this asset be converted into dollars for ministry?

EQUIPPING WORLD-CHANGING DISCIPLES [UMCDiscipleship.org](http://UMCDiscipleship.org)

DISCIPLESHIP MINISTRIES  
The United Methodist Church

16

---

---

---

---

---

---

---

---

### Asset Pocket: Acknowledging Value



In most cases, finding the cash value of the gift is left to the donor.

EQUIPPING WORLD-CHANGING DISCIPLES [UMCDiscipleship.org](http://UMCDiscipleship.org)

DISCIPLESHIP MINISTRIES  
The United Methodist Church

17

---

---

---

---

---

---

---

---

### Asset Pocket: Not Always an Asset

Sometimes it's OK to say:  
**"No, thank you."**



Every church should have a "Gift Acceptance Policy" written, approved, and in force.

EQUIPPING WORLD-CHANGING DISCIPLES [UMCDiscipleship.org](http://UMCDiscipleship.org)

DISCIPLESHIP MINISTRIES  
The United Methodist Church

18

---

---

---

---

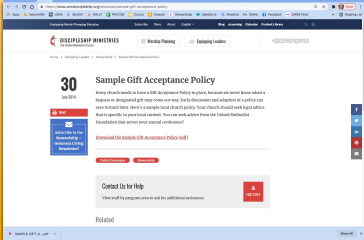
---

---

---

---

# Have a Gift Acceptance Policy?



19

---

---

---

---

---

---

---

---

# Are We Ready for an Asset Gift?



## Does your Church have a Planned Giving Program?

20

---

---

---

---

---

---

---

---

# Legacy Pocket: Will & Bequests

“We all will die.”



21

---

---

---

---

---

---

---

---

## Inviting Gifts from Legacy Pocket

When people die, their assets will go:

- To their family/friends
- To charity/school/church
- To the government

A valid Will ensures that you get to direct how your wishes should be fulfilled.

EQUIPPING WORLD-CHANGING DISCIPLES [UMCdiscipleship.org](http://UMCdiscipleship.org)

DISCIPLESHIP MINISTRIES  
The United Methodist Church

22

---

---

---

---

---

---

---

---

## Legacy Pocket: Endowed Gift



Gifts that will have an impact that extends beyond our earthly life.

EQUIPPING WORLD-CHANGING DISCIPLES [UMCdiscipleship.org](http://UMCdiscipleship.org)

DISCIPLESHIP MINISTRIES  
The United Methodist Church

23

---

---

---

---

---

---

---

---

## Inviting Gifts from Legacy Pocket



All the asset pocket gifts we mentioned can also be impactful ways to give from the Legacy Pocket as well.

EQUIPPING WORLD-CHANGING DISCIPLES [UMCdiscipleship.org](http://UMCdiscipleship.org)

DISCIPLESHIP MINISTRIES  
The United Methodist Church

24

---

---

---

---

---

---

---

---



25

---

---

---

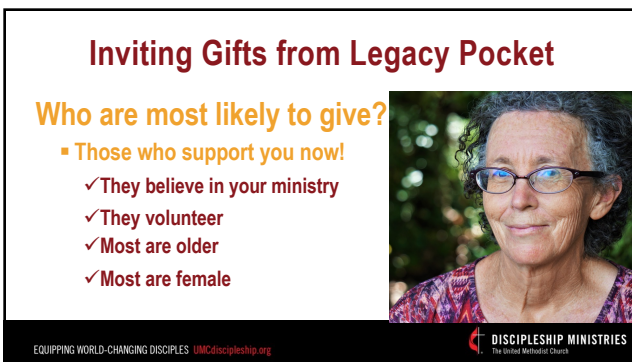
---

---

---

---

---



26

---

---

---

---

---

---

---

---



27

---

---

---

---

---

---

---

---

## Inviting Gifts from Legacy Pocket

- Endowments
- Charitable Gift Annuities
- Charitable Remainder Trust
- Pooled Income Funds, etc.

People can donate now, get tax advantages, see fruits of their gifts, or even get income while they are living!



EQUIPPING WORLD-CHANGING DISCIPLES [UMCDiscipleship.org](http://UMCDiscipleship.org)

DISCIPLESHIP MINISTRIES  
The United Methodist Church

---

---

---

---

---

---

---

---

28

## Inviting Gifts from Legacy Pocket

These kind of gifts require vision, beginning with church leaders and achieving buy-in from members!



EQUIPPING WORLD-CHANGING DISCIPLES [UMCDiscipleship.org](http://UMCDiscipleship.org)

DISCIPLESHIP MINISTRIES  
The United Methodist Church

---

---

---

---

---

---

---

---

29

## Can We Improve Our Communication?



EQUIPPING WORLD-CHANGING DISCIPLES [UMCDiscipleship.org](http://UMCDiscipleship.org)

DISCIPLESHIP MINISTRIES  
The United Methodist Church

---

---

---

---

---

---

---

---

30

## Sharing the Opportunities for Giving



**Brochures**  
**Education**  
**Stories**  
**Training**

**Newsletters**  
**Email**  
**Website**  
**Social Media**



EQUIPPING WORLD-CHANGING DISCIPLES [UMCdiscipleship.org](http://UMCdiscipleship.org)

**DISCIPLESHIP MINISTRIES**  
The United Methodist Church

31

---

---

---

---

---

---

---

---

## Where Do We Begin?

**Start With Yourself!**  
**Work With Your Leaders**  
**Make a list of what to give**  
**Dream about ministry that could be**



EQUIPPING WORLD-CHANGING DISCIPLES [UMCdiscipleship.org](http://UMCdiscipleship.org)

**DISCIPLESHIP MINISTRIES**  
The United Methodist Church

32

---

---

---

---

---

---

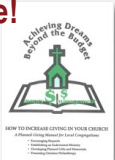
---

---

## Resources are Available!



**2 PDF brochures:**  
"The Pastor's Role"  
"Five Year Plan"



**Scanned PDF:**  
"Achieving Dreams  
Beyond The Budget"

EQUIPPING WORLD-CHANGING DISCIPLES [UMCdiscipleship.org](http://UMCdiscipleship.org)

**DISCIPLESHIP MINISTRIES**  
The United Methodist Church

33

---

---

---

---

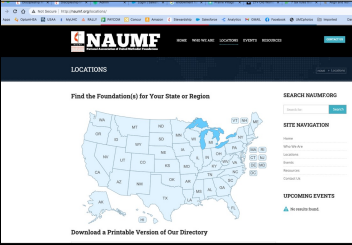
---

---

---

---

## Expertise in Asset & Legacy Gifts



Find the Foundation(s) for Your State or Region

Download a Printable Version of Our Directory

Contact the United Methodist Foundation that serves your Annual Conference.

*This is what they do!*

[naumf.org/locations](http://naumf.org/locations)

EQUIPPING WORLD-CHANGING DISCIPLES [UMCdiscipleship.org](http://UMCdiscipleship.org)

DISCIPLESHIP MINISTRIES  
The United Methodist Church

34

---

---

---

---

---

---

---

---

## Questions? Thank You!



EQUIPPING WORLD-CHANGING DISCIPLES [UMCdiscipleship.org](http://UMCdiscipleship.org)

DISCIPLESHIP MINISTRIES  
The United Methodist Church

35

---

---

---

---

---

---

---

---

## Upcoming Webinars

Tuesday, January 4, 2022, 6:30pm CST  
Stewardship & Finance: Get it Right at the Starting Line

Monday, February 7, 2022, 11:00am CST  
Clergy: Get Smarter About Your Taxes

[UMCdiscipleship.org/stewardship](http://UMCdiscipleship.org/stewardship)

EQUIPPING WORLD-CHANGING DISCIPLES [UMCdiscipleship.org](http://UMCdiscipleship.org)

©2021 Discipleship Ministries  
The United Methodist Church

DISCIPLESHIP MINISTRIES  
The United Methodist Church

36

---

---

---

---

---

---

---

---